



Strategies for e- Resource Cancellations

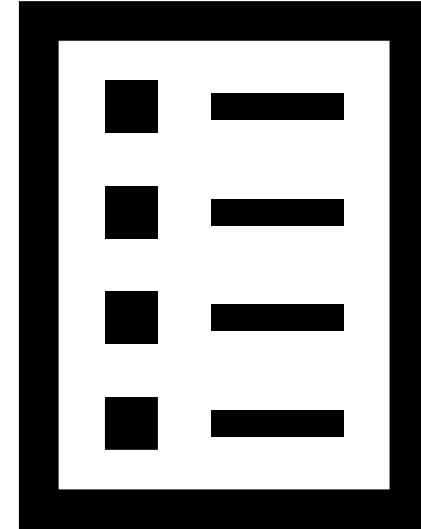
Esta Tovstiadi
May 21, 2020
10 am

www.suny.edu



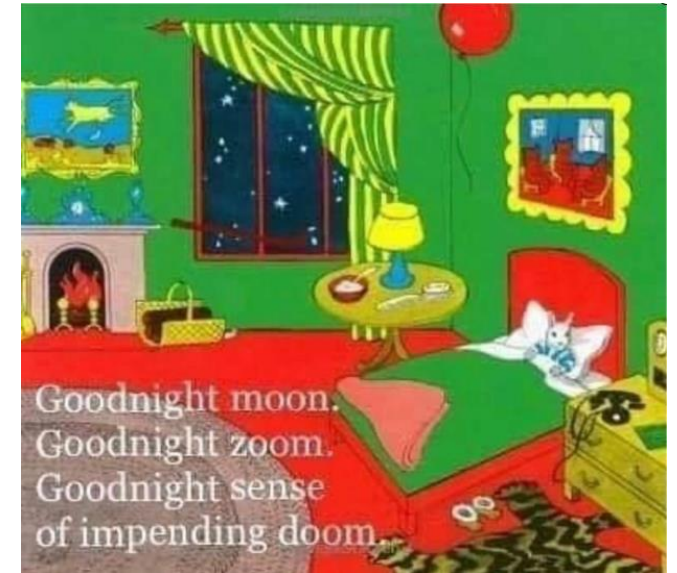
Today's plan

- Process for making cancellations decisions
- Strategies for working with vendors
- Post-cancellation ERM tasks



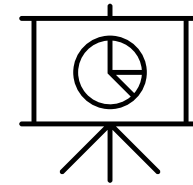
A caveat

- We are in a crisis.
- We don't have the luxury of endless staff time.
- We need to make decisions, and we need to make them quickly.
- A lot of the data that we use to evaluate e-resources is not perfect.
- But, it's good enough.
- You are good enough.
- This presentation will focus on how to make the best decision, with the data that you have.



Process for e-resource review

1. Communicate with stakeholders
2. Gather the information that you need
3. Decide what to consider for cuts
4. Communicate with stakeholders
5. Conduct analysis
6. Communicate with stakeholders
7. Communicate cancellations to vendors
8. Wrap up e-resource access



A photograph of three young people (two men and one woman) standing outdoors and talking. The image is overlaid with a semi-transparent blue filter. The woman is on the left, looking towards the two men. The man in the center is looking towards the man on the right. The background shows green foliage.

Communicating with Stakeholders

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Defining Stakeholders

- Define the stakeholders
 - Faculty? Students? Administration? Vendors? Library workers? Other SUNYs?
- Different frequencies and focus of communication for different stakeholders.



<http://www.niagaracc.suny.edu/i/v3/thumbnails/ACE-homepage--thumbnail.jpg>

Create a Strategy

- Have a strategy
 - What is the goal of your communication? Inform? Gather feedback? Persuade? Assuage fears? Beg for funding?
- Set expectations regarding feedback
 - What are you going to do with the feedback?



<https://www.facebook.com/350146522929/photos/p.10157316997942930/10157316997942930/>

Methods and Frequency of Communication



<https://www.facebook.com/153856078960/photos/p.10157088870078961/10157088870078961/>

- Serendipity is gone – be proactive
- Do it early, and do it often
- Multiple modes of communication reach more audiences:
 - Email
 - Newsletters, Faculty meetings,
 - Open Zoom meeting (if you dare!)

Communicating with library colleagues

- All staff, but especially instruction librarians, subject liaisons – anyone who isn't directly involved with the cancellation process.



<https://www.binghamton.edu/apps/messaging/photo/?id=1106>

Ideas for communication strategy (faculty):

- Before cancelling resources:
 - Query faculty using a survey, asking which e-resources are essential to their courses
 - Host a presentation for faculty where you go over the process, discuss the need for cancelling
 - Create a page on the library website outlining the cancellation process
- During the analysis:
 - Reach out to faculty in certain departments to ask for feedback on subject-specific resources
 - List the resources you are considering cancelling on the library website, along with justification
 - Solicit feedback from faculty (individually, through an open forum, via email, survey, etc)
- After decisions are made:
 - Create a page on the library website outlining alternative access, other resources faculty can use in their courses (OER content might fit some of this need)

Example informational pages from other libraries:

- University of Iowa: <https://www.lib.uiowa.edu/cancellations/>
- University of California, Santa Cruz: https://guides.library.ucsc.edu/serial_cancellations
- University of Arkansas Little Rock: <https://ualr.edu/library/2019/12/17/2020-cancelled-library-titles-databases/>
- Grand Valley State University: <https://www.gvsu.edu/library/collections-review-69.htm>
- University of Houston Downtown: <https://library.uhd.edu/c.php?g=878271&p=6308034>





Gathering information

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The data that you'll need

- List of all resources & pricing
- Administrative logins
- Feedback from faculty
- Data from reference desk transactions, consultations, chats, etc.



<https://www.genesee.edu/library/about-the-library/>

List(s) of all resources

- Aggregator databases, ebook & ejournal packages, streaming videos, individual journal subscriptions, etc
- If you are using Alma Acquisitions:
 - Use the e-inventory Subject Area in Alma Analytics to generate a list
- If you use a vendor such as EBSCO, LM Info, WT Cox, for serials, pull a report of current subscriptions from there
- If you are using a spreadsheet, make sure it contains the following:
 - Resource price (current year as well as previous)
 - Percentage price increase (helpful to project future costs)
 - Subscription term dates
 - Vendor

Administrative logins

- You need these to pull usage reports (unless you have SUSHI set up in Alma; but you'll still probably need some of them)
- You can store these in Alma, in the Vendor's Interface record!*
 - E-inventory Subject Area, field "Linking Note" to pull a report
- A spreadsheet works too
- You will probably have to change your passwords (and sometimes this takes a few days)

*See:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors#Editing_Vendor_Interface_Information](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors#Editing_Vendor_Interface_Information)



Feedback

- Emails, other feedback from faculty.
- If you have them, detailed statistics on reference transactions:
 - Chat transcripts
 - Reference questions (LibAnswers)
 - Consultations



<https://facilitiesconstruction.buffalostate.edu/selective-renovations-butler-library>



Which Resources to Consider

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Which resources do I consider for cuts?

- ALL OF THEM
- How much time do you have to devote to this analysis?
 - Not much time: attack the most expensive resources
 - A lot of time: conduct a more nuanced or comprehensive analysis that considers all subscriptions
- Consider the costs beyond price:
 - Staff time spent managing the resource
 - Interoperability with Alma and Primo
- Know your campus' needs
 - Data on enrollment by program – even if you're certain, it's always good to review
 - Review several years' worth, if you can, to identify trends

Online Nursing Database	2,500.00
LibWizard LibGuides	2,675.00
Renew License	668.00
Chron of Higher Education	2,300.00
Fergusons Career	2,753.59
History Research Center	3,299.00
Replenish Account	4,500.00
AskUs 24/7	435.00
Digital Library	1,295.00

Which resource do I consider for cuts?

- A few ideas:
 - Your print collection – monographs, reference, standing orders
 - Resources used for print collection development (Choice, Books in Print: similar data can be found in GOBI or OASIS)
- Your journal subscriptions
 - There may exist duplication in databases
 - In the past, aggregator duplication may not have been enough of a reason to cancel – that may have changed based on your budget.
- Big, expensive databases
 - Even if you know that they are well-used, if they eat up a sizeable portion of your budget, then you should always consider them for cancellation.
- Little, obscure databases
- Basically, all of them.

A photograph of three young people (two men and one woman) standing outdoors and talking. The image is overlaid with a semi-transparent blue filter. The woman is on the left, looking towards the two men. The man in the center is wearing a plaid shirt and a backpack, looking towards the man on the right. The man on the right is wearing a blue polo shirt, looking towards the man in the center.

Conduct the Analysis

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Questions to consider:

1. Why did we subscribe to the resource initially?
2. Who is using the resource?
3. Why are they using the resource?
4. How do we currently buy the resource?
5. Is there any other way to buy/access the resource?
6. Are there options for downsizing within the current license?
7. Would downsizing have any implications for staff time/cost?
8. What do we retain if we stop subscribing to the resource?
9. What would be the impact of not having the resource?
10. What are the trends in usage? Recent and historical.
11. Is there a similar resource? If yes, then how do the two compare? What is the relative use of each?

From: <https://insights.uksg.org/articles/10.1629/uksg.495/>

Ways to answer those questions:

- ❑ Usage statistics – COUNTER or vendor-created
- ❑ Overlap analysis – from Alma or manually
- ❑ (also citation reports, but we aren't going to cover these in this training)

Multimedia Report 2 (R4) Number of Successful Full Multimedia Content Unit Requests by Month, Collection and Item Type				
[REDACTED]				
Period covered by Report: 2019-07-01 to 2020-04-30				
Date run:				
Collection	Content Provider	Platform	Item Type	Reporting Period To
Total for all collections			Non-textual resource: Video	
American History in Video	Alexander Street Press	search.alexanderstreet.com	Non-textual resource: Video	
American History in Video	Alexander Street Press	video.alexanderstreet.com	Non-textual resource: Video	
Number of Successful Full Multimedia Content Unit Requests by Month, Collection and Item Type. This report is in accordance with R... multimedia content, broken down by month, collection and item type.				

A caveat about usage statistics

- Usage is complex, the data can be messy
- There is some concern that the numbers aren't always accurate
- A faculty using a journal article may be worth more to you than a student using one
 - (You can deep-dive analysis of your EZProxy logs to see whether usage is coming from students or faculty, or others; but I'm not going over that today)
- A lot of things impact usage – platform design, discovery layer

Garbage In, Gospel Out: Twelve Reasons Why Librarians Should Not Accept Cost-per-Download Figures at Face

Value <https://doi.org/10.1080/0361526X.2012.680687>

Available via SUNYConnect EBSCO LISTA w/FT

COUNTER Code of Practice

- Standard for calculating e-resource usage and formatting usage reports
- Vendors can provide usage in a consistent way
- Current Code is version 5; 4 still in use by some providers
- Allows you to compare use across platforms and vendors
- COUNTER Foundation Classes:
 - <https://www.projectcounter.org/counter-foundation-classes/>
 - Brief videos that explain important concepts (such as how the various metrics are defined)
- Manual for Librarians (not all sections published):
 - <https://www.projectcounter.org/manual-for-librarians/>
- Vendors that are R5 COUNTER compliant:
 - <https://www.projectcounter.org/about/register/>



What are the COUNTER R5 metric types?

Searches

Searches_regular: Number of searches conducted on the host site or against a user-selected database where results are returned to the user on the host UI. The user is responsible for selecting the databases or set of data to be searched. This metric only applies to usage tracked at the database level and is not represented at the Platform level.

Requests

Total_requests: Total number of times a content item was requested (i. e. the full text or content was downloaded or viewed).
Double-click filters applied.

Total_investigations: Total number of times a content item or information related to a content item was accessed. Double-click filters are applied to these transactions. Examples of items are articles, book chapters, multimedia files.

Also: Access denied

<https://www.projectcounter.org/code-of-practice/counter-release5-faqs/>

Non-COUNTER

- As many metrics as there are vendors:
 - Full-text download, views, clicks, plays, pageviews
 - Search, query, browse, clicks
 - Logins, unique logins, users, accounts created, sessions
- Most vendors provide guidance on how to interpret their usage reports. Don't assume you understand what the metric means if the report is not COUNTER. Read the documentation, or contact the vendor

Content Title	% of film played	# Aggregated Playbacks
Not for Ourselves Alone: The Story of Elizabeth Cady Stanton & Susar	0.02%	7
Apollo 13	0.34%	2
Thomas Jefferson: A View From the Mountain	0.08%	2
NATO: Background to Berlin	5.34%	2
Willa Beatrice Brown: An American Aviator	1.73%	2



Ways to consider usage

- Cost per use
 - The price per full text download, search, session or other applicable metric
- Cost per FTE
 - The price per student
 - Good for resources that only support a specific academic department, program
- Click throughs – Primo
 - How many times someone clicked through to the resource from Primo or the Alma linkresolver
 - Good for resources that don't offer platform usage
- Historical use
 - Comparing this year's use to previous years
 - Will probably follow a similar trend to enrollment, or go up
- Comparative use
 - Looking at a package of ebooks or ejournals, comparing individual title use to other titles in the package
 - Packages of similar formats (ebooks, ejournals, streaming media)
 - Address a similar need in a subject area

Cost per use (CPU)

- The cost of the resource for the subscription term / the usage metric
- $\$2,000 / 500$ full text downloads = $\$4.00$ per download
- Compare this to what it might cost to get the article through other means:
 - ILL = $\$17$
 - On demand article purchase $\$15$ - $\$30$
 - Open access version = $\$0$
- If CPU is lower than those other means, then this resource is providing a good value (based on CPU alone)
- How to calculate cost per use using Alma: https://slcny.libguides.com/training-eresources/analytics_erm

Cost per FTE (CPU)

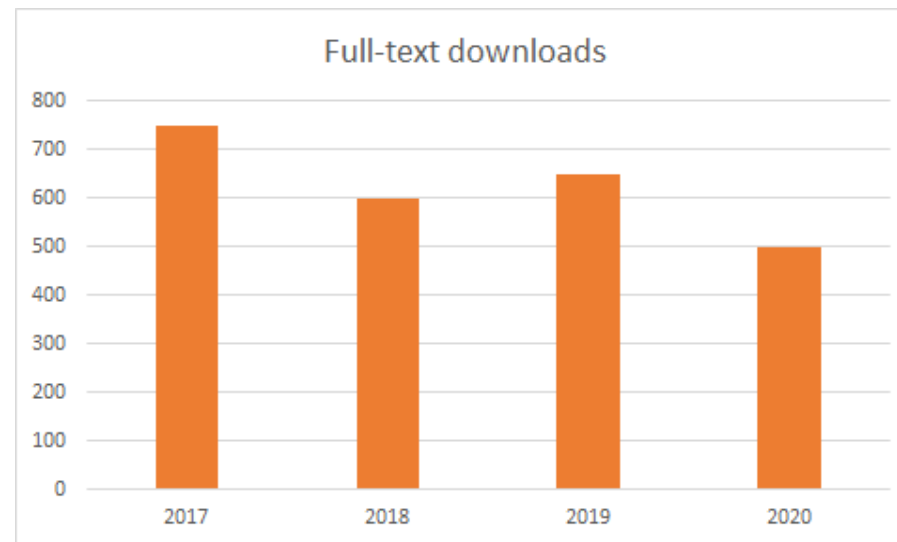
- The cost of the resource for the subscription term / the FTE for the subscription term
- For example, a database of nursing videos costs \$2,500, probably used exclusively by nursing students (200 FTE)
- $\$2,500 / 200$ students enrolled in the nursing program = \$12.50
- If use is low (maybe the resource is a new subscription, or there were problems setting it up, etc), then this metric can be used to demonstrate value
- It can also be used when usage statistics aren't available

Alma link resolver usage

- Shows clicks in the "View Online" section of the full record in Primo, as well as Alma link resolver in databases (similar to 360Link Click-through statistics)
- Access via Alma Analytics
- Shared reports and dashboards: Shared Folders -> Alma -> Usage Via Alma Link Resolver
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/080Analytics/Alma_Analytics_Subject_Areas/Link_Resolver_Usage](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Link_Resolver_Usage)
- Tells you how many times someone navigated to a resource/journal/database, but it doesn't tell you what the user did after they got to the resource, so remember that as you're working with this metric.

Historical use

- Comparing usage metrics over several years
- Helps you see overall trend – continual decline suggests less value, or lower enrollment, or both
- Can be compared with FTE to see if trend follows enrollment trend



Comparative use

- How does the use of a title in one package compare to similar titles in the same package?
- How does the usage of a subject database compare to the use of a similar subject database?
- For example, in a package of nursing ebook titles, most titles averaged about 500 full-text downloads in FY20. Titles with usage that falls significantly outside this average may not be providing the best value.

Overlap Analysis

- Answers the questions:
 - Is the content available in any other resources?
 - How much of the content is available elsewhere?
 - Which titles/dates are exclusive to this resource? (and are they worth the cost of the subscription?)
- How
 - Manually determined in Excel using identifiers (Title, ISSN, ISBN)
 - Alma Overlap Analysis tool (https://slcnyc.libguides.com/training-eresources/content_analysis)

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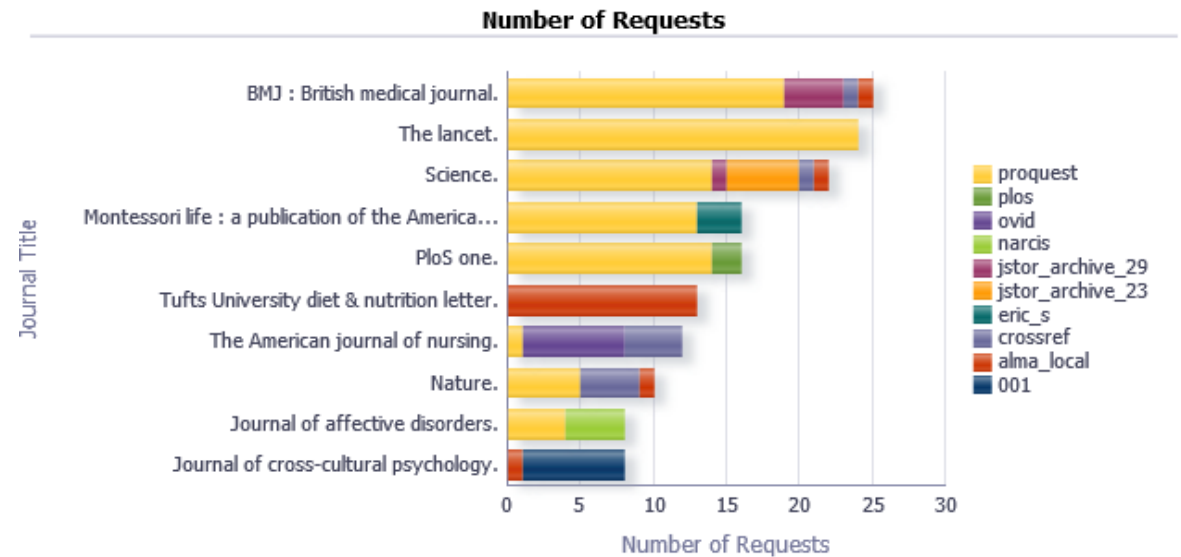
Making a Decision

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Reasons to renew resources

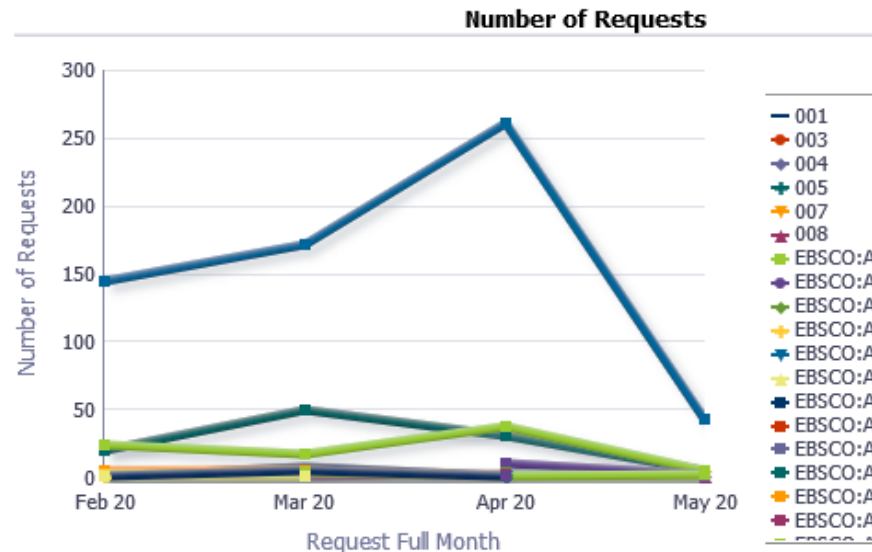
- Directly supports academic program(s) at your campus
- Sustained high use
- Acceptable CPU
- Provides value in other ways
- Price is affordable



Reasons to cut resources

Requests by source

From 02/21/2020 to 05/21/2020



- No longer fills a programmatic need on campus, or is duplicative of another resource
- Sustained low or dropping use (at least 2 years)
- High CPU
- Overly burdensome to manage
- Content is mostly available elsewhere
- Price is not affordable

Alternatives to subscribing

- Inter-library loan
- Reprints Desk (purchase articles at point of need using Alma's link resolver)
 - <http://slcny.libanswers.com/faq/278109>
- Article Gateway (automated/unmediated Reprints Desk)
- Open access (unpaywall)





ERM Cancellation Tasks

ERM Cancellation Workflow

- Check license and communicate with vendor about perpetual access
 - You might have to prove that you have paid for access, by providing PO numbers and or other documentation.
 - Balance your need to secure this access with the amount of time managing it might take.
- If no perpetual access:
 - Remove link from database A-Z list ("Hide" the database in SpringShare A-Z list if you want to retain it internally for your own records). Hiding or removing from the A-Z should remove any links on LibGuides; you might have to remove links on your library website manually.
 - Follow the e-resource cancellation workflow in Alma: <https://slcny.libguides.com/training-eresources/cancellation> (close the PO line, then deactivate and delete the resource).
 - Remove relevant stanzas from EZProxy
 - If there are other points of access, remove those (bib records in Alma, Resource Recommender in Alma, etc)

ERM Cancellation Workflow

- If perpetual access exists:
 - Verify access is working on the vendor's site, several times after cancelling
 - Close out any non-perpetual access in Alma
 - If you are using Alma acquisitions, close the PO line
(workflow: <https://slcny.libguides.com/training-eresources/cancellation>)
 - Set up perpetual access in Alma
 - Update any descriptions (A-Z list, links on website, etc) to reflect perpetual access





Vendor strategies

Vendor strategies

- Be honest about what you are considering. Vendors would rather have some of your business than none.
- Ask for a temporary discount.
 - "We need to reduce the price on this resource for us to continue to subscribe to it. How can we work together to make that happen?"
 - "Would you consider a one-time discount of 10% off on this year's renewal?"
- Name your price
 - Share your cost per use, and tell them what you need it to be in order to continue subscribing.
 - "[Similar SUNY school] pays X; we want a price consistent with that amount."
- Be proactive. Contact vendors before they invoice you.
- Vendors want your business. You have more power than you realize, especially right now.



The State University
of New York

Questions and Discussion

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